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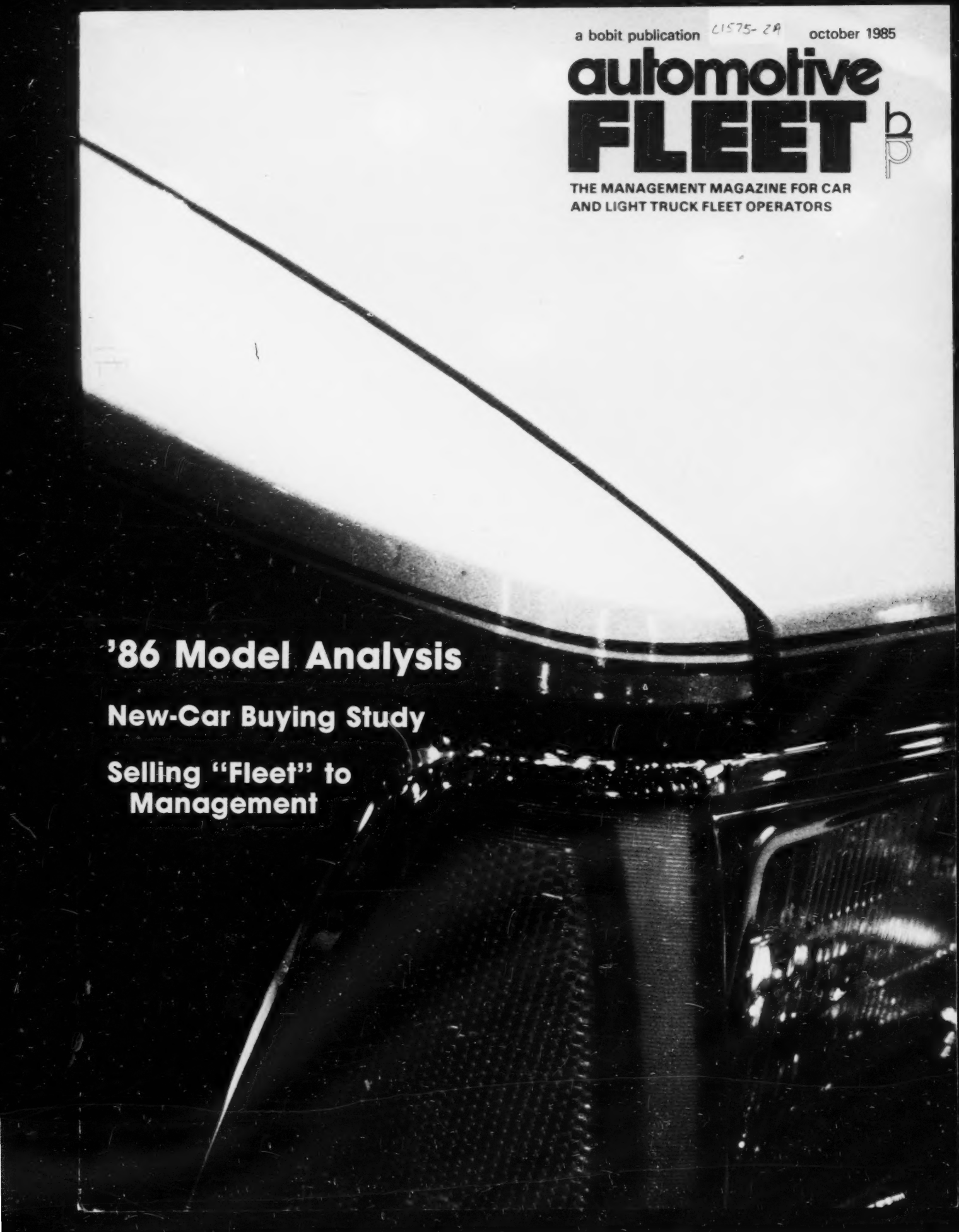
automotive FLEET

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS



'86 Model Analysis

New-Car Buying Study

Selling "Fleet" to Management

OCTOBER 1985 VOL. 24, NO. 12

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THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

Influencing the management of 4,584,000 cars and 1,970,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

FEATURES

Factory Fleet Directors' Outlook p. 21

The 1986 Model Year p. 38

A Fast-Change Oil Service Means Slick Savings for Fleets p. 59

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Warranties and Service Contracts Help Fleets Sell Used Cars p. 102

Class IIIs in Air Freight and "Hamburgers" p. 106

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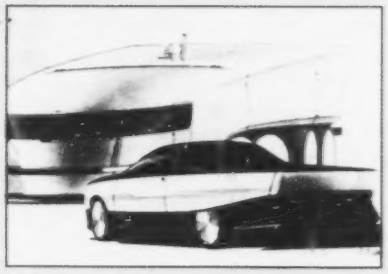

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On our cover: With automakers working hard to satisfy consumer preference — as well as federal fuel economy standards — fleet managers can look for sleeker, more aerodynamic styling on many of the '86 cars. That's evident in this month's striking cover photo, provided courtesy of PPG Industries.

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Calendar

OCTOBER

9-13 — International Taxicabs Association Annual Convention and Trade Show, Sheraton Harbor Island, San Diego, CA.

10 — National Vehicle Leasing Association's Negotiation Skills Seminar, Hyatt Regency O'Hare, Chicago, IL. Information: (213) 477-1287.

10-11 — Buzz Doering Automobile Leasing Seminar, Airport Marriott, Atlanta, GA. Information: (414) 367-6700.

12-16 — International Association of Chiefs of Police Annual Conference, Astro Hall, Houston, TX.

14 — Institute of Traffic and Transportation seminar on Transportation Leasing & Contracts, Best Western El Rancho Inn, San Francisco, CA. Information: (216) 234-6280.

15-16 — Automotive Fleet Administration seminar sponsored by the University of California Institute of Transportation Studies, The Stardust Hotel, San Diego, CA. Info: (415) 642-1111.

16 — LeaseTrack's Auto Lease Sales Training Seminar, Howard Johnson's Motor Lodge, Portsmouth, NH. Information: (617) 964-5196.

23-26 — American Association of Equipment Lessors' 24th Annual Convention, Disneyland Hotel, Anaheim, CA.

28-31 — National Safety Council's 73rd Annual National Safety Congress and Exposition, New Orleans, LA. Information (312) 527-4800.

NOVEMBER

11-13 — *Limousine & Chauffeur* Limo Show and Conference, Caesars Palace, Las Vegas, NV. Information: (213) 376-8788.

12-14 — National Association of Fleet Administrators' Basic Principles of Fleet Management, Course 110, Phoenix Hilton, Phoenix, AZ.

DECEMBER

9-11 — *Limousine & Chauffeur* Limo Show and Conference, Harrah's Trump Plaza, Atlantic City, NJ.

Gas Prices

UNLEADED

City	Cost Per Gallon Unleaded Full-Serve	Self-Serve
Birmingham, AL	146.4	115.9
Flagstaff, AZ	154.4	135.4
Oakland, CA	159.2	119.9
New Haven, CT	144.9	126.9
Washington, D.C.	147.3	120.5
Atlanta, GA	148.2	119.0
Des Moines, IA	148.0	132.0
Joliet, IL	155.4	126.4
Wichita, KS	146.9	121.2
Buzzards Bay, MA	121.9	106.9
Wilmington, NC	130.4	116.4
Rochester, NY	127.4	121.6
Philadelphia, PA	136.0	118.0

Survey conducted during the first five working days of September, 1985. Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.

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Hotline

BIGGER CHRYSLERS...could be on the market by late '88 or mid-year '89. According to a report in Motor *magazine, the upsized vehicles will feature front-wheel-drive and seating for six passengers. Unlike Ford and GM, Chrysler can afford to go bigger because of its healthy bank of CAFE mileage credits.*

LAST MONTH WE NOTED...that GM market share had shrunk from 46 percent in 1980 to some 42 percent in '85. Undaunted, GM Chairman Roger Smith is now predicting a "substantial" increase in the firm's '86 share due to the popularity of new models like the Pontiac Grand Am sedan, the FWD Buick LeSabre, and the redesigned Cadillac Seville. GM's '85 losses can be traced to UAW strikes and plant shutdowns due to model changeovers, Smith claims. He adds that overall U.S. sales could reach 15.4 million units this year.

A USED-CAR DEALER...in East Greenwich, RI, has been hit with a substantial penalty for odometer-tampering. Emilio DiSanto, 47, was fined $260,000 and sentenced to four years in prison by U.S. District Judge Francis Boyle. DiSanto had been indicted a year ago on 38 counts of tampering, pleading guilty to seven. One of DiSanto's former employees drew an additional fine of $25,000 and an 18-month prison term.

COMPLICATING THE PROBLEM...of high premiums, daily rental firms have a new insurance worry: the possibility of lawsuits resulting when customers drive drunk. In a case with sobering implications for rental operators everywhere, the family of a 30-year-old man who was killed in a Virginia car accident by the intoxicated driver of a Hertz rental won $637,500 from Hertz, the driver, and his employer, California's Polaris Aircraft. A $100,000 insurance policy that was part of the driver's rental contract with Hertz reportedly will go toward the settlement.

REVENUES FROM VEHICLE LEASING AND RENTAL...soared 10.8 percent in '84 to a record $44.78 billion, and total units in service edged up 1.8 percent to an annual high of 6,249,000. That's the word from Hertz Corp., whose annual industry estimate also shows rental cars in service climbing to 610,000 units in '84, up 16.2 percent from '83. New cars and trucks entering lease-rental service were also up 2 percent from '83 to 1,903,000 in '84. Other key findings: the share of new lease-rental vehicle sales compared to total new car and truck sales has grown from less than 1 percent in 1950 to 14 percent last year.

1986 AMC/Jeep Fleet Allowance Programs

VEHICLE	FLEET ALLOWANCE PER UNIT
AMC	
Eagle Series 30	Factory Air Conditioning and/or Automatic Transmission At No Charge
Jeep	
CJ-7	$ 200
Comanche	$ 300
Cherokee	$ 700
Wagoneer	$ 700
J-10/J-20 Trucks	$1000
Grand Wagoneer*	$ 0 — Units 1 thru 4 $ 500 — Units 5 thru 9, retroactive $2000 — Units 10 or more, retroactive

*Grand Wagoneer allowances not available for Employee-Owned Program.

Trends in Car/Truck Leasing and Rental

SEGMENT	1984	1983	1974
Car Leasing			
Units in Service:	4,567,000	4,559,000	3,686,000
Revenues:	$27,309,000,000	$24,430,000,000	$7,454,000,000
(Individual leases:	1,556,000	1,653,000	1,008,000)
Car Rental			
Units in Service:	610,000	525,000	361,000
Revenues:	$4,450,000,000	$4,010,000,000	$1,396,000,000
Truck Leasing			
Units in Service:	874,000	854,000	725,000
Revenues:	$9,803,000,000	$9,174,000,000	$4,127,000,000
Truck Rental			
Units in Service:	198,000	188,000	165,000
Revenues:	$3,222,000,000	$2,932,000,000	$1,001,000,000

Source: Hertz Corp.

NAFA's New-Car Acquisition Survey

The swing to mid-size cars by fleet managers is gathering momentum. During the 1986 model year, two out of every three new cars will be a mid-size unit, according to the annual new-car acquisition survey of the National Association of Fleet Administrators (NAFA).

In 1984, mid-size cars accounted for 35 percent of the new-car orders; in 1985 the figure jumped to 54 percent, and this year it will reach 67 percent. The popularity of the mid-size cars is coming at the expense of both compacts and large cars. Subcompacts are practically non-existent in commercial fleets, accounting for only one percent of the vehicles in service.

A total of 243 fleets participated in NAFA's new-car acquisition survey. They operate a total of 173,248 passenger cars. These fleets plan to acquire slightly more than 60,000 new cars during the 1986 model year, nearly 3,000 more than they acquired during the last model year.

A breakdown of the 243 responses reveals that 191 fleets are commercial firms in the United States. The balance is divided among 15 public utility fleets and 18 fleets for government agencies (see next month's issue for details on these two categories), and 19 Canadian-based fleets.

Other highlights of the survey are:

•AM/FM stereo, cruise control, and tilt steering wheel are growing rapidly as options ordered in every car by more and more fleets. If the trend continues they may be as common as automatic transmissions and air conditioning.

•Four-door sedans continue to dominate among the body styles selected by fleet managers. The new vans have been able to garner only three percent of the new-car orders.

•While only a handful of fleets are

U.S. COMMERCIAL FLEET SUMMARY

Group	Number of Cars	Owned	Leased	Sub Compact	Compact	Mid Size	Large	1985 New Car Acquisitions	1986 Planned New Car Acquisitions	Sub Compact	Compact	Mid Size	Large
Drug & Cosmetics (26)	18,921	2,441	16,480	300	1,843	15,901	877	7,696	7,788	150	669	6,663	306
Food & Beverage (21)	14,979	9,197	5,782	2	3,495	10,722	760	6,588	6,647	—	1,495	4,923	229
Chemical & Petroleum (31)	18,434	8,890	9,544	120	827	11,137	6,275	5,316	6,527	40	595	4,004	1,886
Insurance (32)	32,860	19,082	13,778	388	19,109	11,852	1,188	10,412	11,030	169	5,778	4,481	305
Manufacturing—Consumer (34)	22,533	14,388	8,145	30	3,102	17,030	1,621	8,602	8,698	3	680	7,494	271
Manufacturing—Industrial (34)	37,644	11,112	26,532	4	14,524	21,612	1,504	13,578	13,819	—	4,796	8,739	284
Financial (13)	1,907	1,197	710	42	318	1,295	252	649	607	10	135	420	42
Totals (191)	147,278	66,307	80,971	886	43,218	89,549	12,477	52,841	55,116	372	14,148	36,724	3,325

NOTE: Totals may differ for the sub-compact, mid size, and large current and planned acquisitions because not every answered this section of the questionnaire

"Imports are still unable to gain a major share..."

making major changes in their new-car specifications, there may be a trend developing in engine specifications — a growing, but still relatively small, switch to four-cylinder engines for the mid-size cars.

•*Imports are still unable to gain a major share of the fleet market. While 35 U.S. commercial fleets reported they have some imports in service, only 11 fleets plan to buy or lease imports in the 1986 model year. The most interesting comment abut the use of imports came from one U.S. government fleet manager who wrote the number of imports is "classified."*

Insurance Group

The Insurance Group participating in the annual new-car acquisition survey consists of 32 fleets operating 32,860 passenger cars (19,082 company-owned, 13,778 leased). The current composition of those fleets is one percent subcompacts; 59 percent compacts; 36 percent mid-size cars, and four percent large cars.

During the 1985 model year, these fleets acquired 10,412 new cars. They plan to acquire 11,030 new units during the 1986 model year. Only one percent of these new cars will be subcompacts; 54 percent will be compacts; 42 percent mid-size cars, and three percent large cars.

Eighty-seven percent of the group's new cars will be four-door sedans. Six percent will be station wagons; three percent will be two-door and three-door models. One percent each of the new-car orders will be for five-door hatchbacks and mini-vans.

Two out of every three new cars will be middle-line vehicles; 23 percent will be bottom-line cars, and 10 percent will be top-of-the-line models.

Only one fleet in the Insurance Group is planning a major change in its vehicle size for 1986 — switching from mid-size cars to compacts. Three fleets are planning to order their new cars with standard transmissions. In two fleets they will be used in compacts and in the other fleet, they will used in subcompacts.

Three fleets in the group are planning to order some specialty cars during the 1986 model year, a total of 25 units. One fleet is planning to acquire a few imports, although four fleets reported they have some imports now in service, 35 units in all.

Of the 32 fleets in the group, 20 give the company-car operator some choice in vehicle selection. Sixteen fleets permit choice of make; 15 choice of model; one allows the employee to select the engine desired; two allow choice of transmission, while ten give the operator a choice of options to be installed on the new car — at his or her expense.

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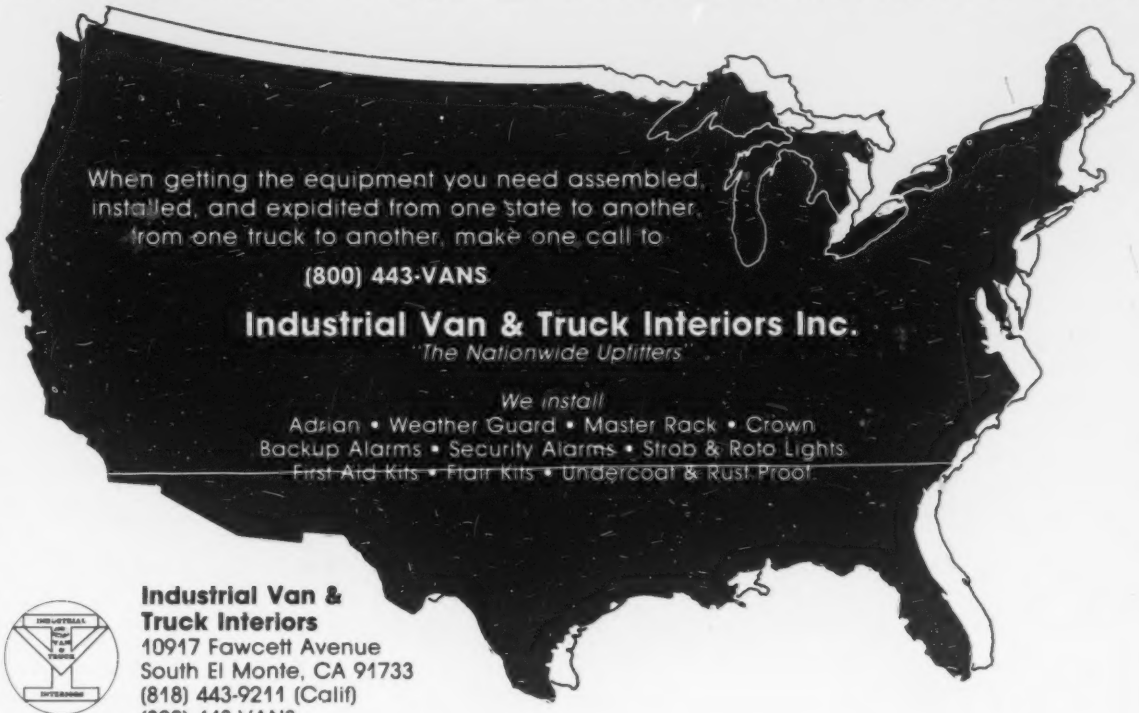
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Circle 142 on Inquiry Card

Group follows a familiar pattern — most compacts are equipped with four-cylinder engines; mid-size cars with sixes, and large cars with eight-cylinder engines.

Food and Beverage Group

The Food and Beverage Group consists of 21 fleets operating 14,979 passenger cars (9,197 company-owned, 5,782 leased). The current composition of the group's cars is 23 percent compacts; 72 percent mid-size units, and four percent large cars. Only one fleet in the group has any subcompacts in its fleet.

The group acquired 6,588 new units during the 1985 model year and they plan to buy or lease 6,647 during the coming model year. Twenty-two percent of the new cars will be compacts; 74 percent will be mid-size cars, and four percent will be large cars. Not one fleet in the Food and Beverage Group is planning to make any major changes in its acquisition policy during the 1986 model year.

Some 62 percent of the group's new cars will be middle-line vehicles; 21 percent will be top-of-the-line models while 16 percent will be bottom-line cars.

Eighty-eight percent of the new-cars orders will be for four-door sedans; five percent for two-door sedans; four percent for vans, and three percent for station wagons.

Four fleets in the group are changing their engine specifications for 1986 — two are switching to turbos while the other two will be ordering four-cylinder engines for their mid-size cars. One fleet in the group plans to equip its cars with standard transmissions.

COMMERCIAL-FLEET PARTICIPANTS IN NAFA's ANNUAL ACQUISITION SURVEY

Group	1983	1984	1985
Insurance	40	39	32
Drug & Cosmetic	16	32	26
Food & Beverage	21	23	21
Chemical & Petroleum	18	29	31
Mfg./Consumer	23	21	34
Mfg./Industrial	31	39	34
Financial	—	—	13
Miscellaneous	25	14	—
Totals	**174**	**197**	**191**

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"...both fleets are switching from compacts to mid-size..."

At the present time, every fleet ordering compacts equips them with four-cylinder engines; in fleets with mid-size cars, half have four-cylinder engines; the other half six-cylinder engines. Half of the large cars in the group are equipped with six-cylinder engines; the other half with eight-cylinder engines.

Two fleets in the group are planning to order a few specialty cars during the 1986 model year. One fleet reported it would acquire a handful of imports. Four fleets said they already had some imports in service, a total of 15 units.

All but four of the 21 fleets give the company-car operator some choice in the vehicle to be used. Sixteen permit a choice of car; nine allow the operator to select the model desired; three allow choice of engine; one allows choice of transmission, and 14 give the operator permission to order additional optional equipment, primarily power options — power windows and door locks.

Drug and Cosmetic Group

The Drug and Cosmetic Group, participating in the 1986 survey, consists of 26 fleets operating 18,921 passenger cars (2,441 company-owned, 16,480 leased). The current composition of the fleet is two percent subcompacts; 10 percent compact cars; 84 mid-size units, and four percent large cars.

The Drug and Cosmetic Group acquired 7,696 new cars during the 1985 model year and plans to acquire slightly more — 7,788 during the 1986 model year. Of the 1986 models being ordered, two percent will be subcompacts (all by one fleet); nine percent will be compacts; 85 percent will be mid-size cars, and four percent will be large cars.

Two fleets are planning major changes in their new car policies — both are switching from compacts to mid-size cars.

Two out of every three new cars in this group will be a four-door sedan. Seventeen percent will be two-door sedans. Seven percent of the new-car orders will be for both station wagons and five-door hatchbacks. Vans will account for two percent of the new-car orders; three-door hatchbacks will be one percent. Sport models account for less than one half of one percent of the new-car orders.

Sixty percent of the new-car orders are for middle-line units; 15 percent for top-of-the-line models, and 25 percent for bottom-line cars.

Five fleets in the group plan to order some specialty cars during the coming model year, a total of about 60 units. Two fleets are planning to acquire a few imports, while six fleets said they now have some imports in service, slightly more than 100 cars out of the total of more than 18,000 in the entire group.

Every fleet using compacts orders them with four-cylinder engines; the majority of fleets using mid-size cars equip them with six-cylinder power plants, while a ma-

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Circle 148 on Inquiry Card

"Nine fleets are planning to change engine specifications..."

jority of the large cars have eight-cylinder engines.

Nine fleets in the group are planning to change their engine specifications in their 1986 new-car orders. Five fleets are switching to four-cylinder engines in their mid-size cars; three fleets are changing to six-cylinder engines in mid-size cars. One fleet plans to order six-cylinder engines for its large cars.

Twenty-four of the 26 fleets give the company-car operator some choice in vehicle selection. Twenty-two permit choice of vehicle; 16 allow the operator to select the model desired; four permit choice of engine; one allows a choice of transmission, and 22 allows the employee to order additional optional equipment.

Chemical and Petroleum Group

The Chemical and Petroleum Group, responding to the 1986 model-acquisition survey, consists of 31 fleets operating 18,434 pas-

U.S. COMPOSITE SURVEY FLEET
1981-1985 Model Years
(Excluding Government & Public Utility Fleets)

	1981	1982	1983	1984	1985
Number of Cars in Fleet	750	762	632	758	771
Current Composition of Fleet					
Sub-Compacts	15	23	12	30	8
Compacts	348	404	323	311	231
Mid Size	320	282	240	349	470
Large	67	53	57	68	62
Actual Acquisitions in Previous Year	284	274	211	266	276
Planned New Car Acquisitions in Coming Model Year	302	284	232	279	288
Sub-Compacts	21	19	2	11	3
Compacts	205	185	133	75	75
Mid Size	67	74	81	151	193
Large	9	6	16	42	17

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"...four-cylinder..."

senger cars (8,890 company-owned, 9,544 leased). The current composition of these fleets is one percent subcompacts (all in one fleet); five percent compacts; 60 percent mid-size cars, and 34 percent large cars.

The fleets in this group acquired 5,316 new cars during the 1985 model year. They plan to buy or lease 6,527 units during the 1986 model year. The new-car acquisitions will consist of one percent subcompacts (again all by one fleet); nine percent compacts; 61 percent mid-size vehicles, and 29 percent large cars.

Ninety-one percent of the new-car orders will be for four-door sedans. Four percent of the orders will be for stations wagons; two percent for vans, and one percent each for two-door sedans and five-door hatchbacks.

Sixty-six percent of the orders will be for middle-line units; 30 percent for bottom-line models and only four percent for top-of-the-line cars.

Two fleets in the group are planning major changes in their new-car policies. One is switching to mid-size cars; the other is moving to compacts.

Practically all compact cars are equipped with four-cylinder engines. The great majority of the mid-size cars are ordered with six-cylinder engines, and most of the large cars come with eight-cylinder engines.

Nine fleets in the group said they plan to make major changes in their engine policies during 1986. Four fleets are switching to four-cylinder engines for mid-size cars; three are moving down to six-cylinder engines in their large cars, while two are moving up in engine size — one is ordering six-cylinder engines in mid-size, the other is using six-cylinder engines in its compacts.

One fleet reported that it will switch to standard transmission in all its 1986 models.

Twenty-four of the 31 fleets in the Chemical and Petroleum Group give the car operator a choice in vehicle selection. All 24 fleets permit the driver to select the make of car desired (from a selector list, of course); 13 permit choice of model;

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"...a trend apparent within the group."

seven allow the employee to choose the engine desired; three allow choice of transmission, but only nine of the 24 permitting a choice allow the operator to add optional items to the car.

Three fleets in the group plan to order a few specialty cars in the coming model year. Only one fleet plans to acquire any imports in 1986. Only one fleet reported that it had any imported cars currently in service — for a total of three units.

Manufacturing—Consumer Group

The Manufacturing—Consumer Group consists of 34 fleets operating 22,533 passenger cars (14,388 company-owned, 8,145 leased). The current composition of these fleets is 14 percent compacts; 78 percent mid-size cars, and seven percent large cars. Subcompacts, used in one fleet, account for less than one-half of one percent of the cars in the group.

The fleets in the group acquired 8,602 new cars during the 1985 model year. In 1986, they plan to buy or lease essentially the same number of vehicles — 8,698. Eight percent of the new-car orders will be for compacts; 89 percent for mid-size cars, and three percent for large units. Only one fleet plans to acquire any subcompacts. The one fleet in the group that will make a major change in new-car acquisition is dropping its subcompacts.

Eighty-one percent of the 1986 model year car orders will be for four-door sedans; 10 percent of the orders will go to station wagons; four percent each for vans and two-door sedans; one percent of the orders will be for five-door hatchbacks.

Eighty-one percent of the group's new-car orders will be middle-line models; 16 percent will be top-of-the-line cars, while the remaining two percent will be for bottom-line cars.

As is the case in the other groups, most fleets in the Manufacturing-Consumer Group equip their compacts with four-cylinder engines; their mid-size cars with six-cylinder engines, and large cars with eight-cylinders.

However, there may be a trend apparent within the group. Four fleets planning major changes in engine-use all say they are switching to four-cylinder engines in mid-size cars. Three fleets in the group are planning to equip new cars with standard transmission: In one fleet mid-size cars with six-cylinder engines; in one fleet with four-cylinder engines in mid-size cars, and in one fleet with four-cylinder compacts.

One fleet reports it is planning to acquire a few specialty cars during the 1986 model year; three fleets are planning to acquire some compacts next year. Twelve fleets say they have a few imported cars already in service, a total of 65 units out of the 22,000 cars now in the group's fleets.

Twenty-five of the 34 fleets in the Manufacturing—Consumer Group have a policy of choice in vehicle selection. Twenty-three fleets give the employee a choice of make of car; 16 permit a choice of model. Three fleets permit the operator to select the engine desired; two allow a choice of transmission. Sixteen fleets permit the operator to purchase additional items of optional equipment. Most specify that such items remain with the car when it is replaced.

Manufacturing—Industrial Group

The Manufacturing—Industrial Group, participating in the 1986 new-car acquisition survey, consists of 34 fleets operating 37,644 passenger cars (11,112 company-owned, 26,532 leased). The current composition of these fleets is 39 percent compacts; 57 percent mid-size, and four percent large cars. Two fleets have subcompacts, accounting for much less than one-half of one percent of the total units.

The fleets in this group acquired 13,578 new cars during the 1985 model year; in 1986 they plan to buy or lease 13,819 new units.

Thirty-five percent of the new units will be compacts; 63 percent will be mid-size cars, and two percent will be large cars. Not one fleet in the group plans to order any subcompacts during the 1986 model year.

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"...all will be moving to smaller powerplants."

Sixty-nine percent of the new-car orders will be for four-door sedans; 18 percent for station wagons; seven percent for two-door sedans, and five percent for vans.

Seventy percent of the new car orders will be for middle-line models; 13 percent for top-of-the-line units, and 16 percent for bottom-line cars.

As in most other groups, the fleets in the Manufacturing—Industrial Group will order compacts with four-cylinders; most mid-size cars with six-cylinder engines, and large cars with eights.

However, five fleets say they will be changing their engine specifications in 1986 — all moving to smaller powerplants. Four fleets will equip mid-size cars with four-cylinder engines, and one will put six-cylinders in its large cars.

Three fleets will specify that 1986 models are equipped with standard transmissions, two only in compacts, and one in all of its new cars.

What Are the Most Important Factors in Selection?

For the second year in a row, "Initial Cost" is the most important factor in fleet-car selection, according to 243 members who participated in NAFA's annual new-car acquisition survey.

A basic question in the survey asks members to rank in order of importance six factors in fleet-car selection. They are: Economy of Operation, Depreciation/Resale Value, Initial Cost, Serviceability (defined as freedom from down time), Prestige, and Fringe Benefit.

In this year's survey, the second-place factor is Depreciation/Resale Value. Economy of Operation ranks third, with Serviceability fourth, Prestige fifth, and Fringe Benefit sixth and last.

Seven groups ranked "Initial Cost" as the single most important factor in fleet-car selection — Chemical & Petroleum, Manufacturing—Consumer, Manufactuing—Industrial, Drug & Cosmetics, Public Utility, Government, and Canada.

Three groups said "Depreciation/Resale Value" was their most rimportant consideration. They are Insurance, Food & Beverage, and Banking.

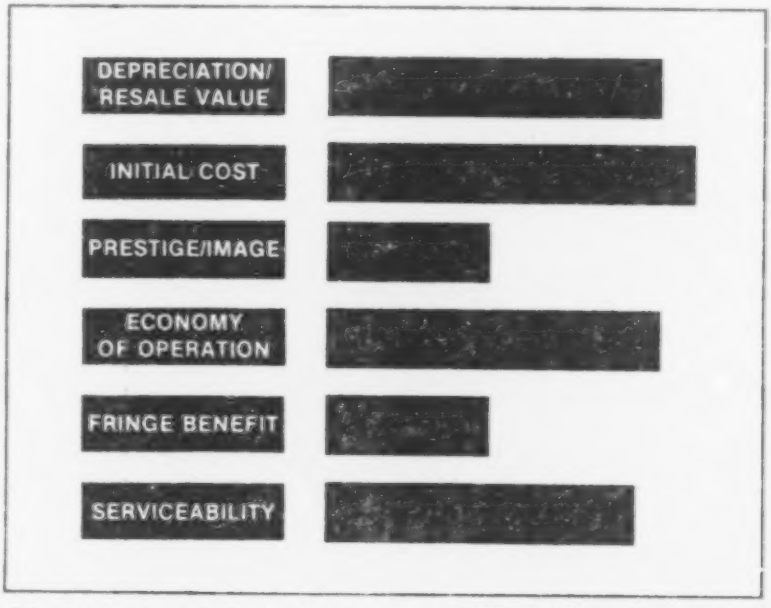
The ratings for each group are:

Banking: Depreciation/Resale Value; Initial Cost, Economy of Operation; Serviceability, Prestige, and Fringe Benefit.

Chemical & Petroleum: Initial Cost, Economy of Operation; Serviceability, Depreciation/Resale Value; Prestige, and Fringe Benefit.

Manufacturing - Consumer: Initial Cost, Depreciation/Resale Value; Economy of Operation; Serviceability, Prestige, and Fringe Benefit.

Drug & Cosmetic: Initial Cost, Depreciation/Resale Value; Economy of Operation; Serviceability, Prestige, and Fringe Benefit.



Manufacturing—Industrial: Initial Cost, Deprication/Resale Value; Economy of Operation, Serviceability, Fringe Benefit, and Prestige.

Insurance: depreciation/Resale Value. Economy of Operation and Initial Cost tied for second place; Serviceability, Fringe Benefit, and Prestige.

Food & Beverage: Depreciation/Resale Value; Initial Cost, Economy of Operation; Serviceability, Prestige, and Fringe Benefit.

Public Utility: Initial Cost, Serviceability, Economy of Operation; Depreciation/Resale Value; Prestige, and Fringe Benefit.

Government: Initial Cost, Serviceability, Economy of Operation; Depreciation/Resale Value, Fringe Benefit, and Prestige.

Canada: Initial Cost, Depreciation/Resale Value; Serviceability, Economy of Operation; Fringe Benefit, and Prestige.

Six fleets in the group report they will be ordering specialty cars in 1986, a total of 90 units. Two fleets plan to acquire a few compacts during the coming model year, while four fleets already have some imported cars in service, about 50 units altogether.

Twenty-seven of the 34 fleets give the company-car operator a voice in fleet-car selection. Twenty-six permit a choice of car make; 17 allow a choice of the model desired. Four fleets permit a choice of engine and three allow the operator to select the transmission needed. Nineteen permit choice of options.

Financial Group

A new group appearing in this year's survey consists of 13 banks and financial institutions. They operate a total of 1,907 cars (1,197 owned, 710 leased). The current composition of this group is two percent subcompacts; 17 percent compacts, 68 percent mid-size, and 13 percent large cars.

During the 1985 model year, these fleets acquired 649 new cars; they plan to buy or lease 607 in the 1986 model year. Of their planned acquisitions, two percent will be subcompacts; 22 percent compacts; 69 percent mid-size cars, and seven percent large cars.

Eighty-one percent of the planned acquisitions will be four-door sedans; 12 percent two-door sedans. Three percent of the orders will be for station wagons, and two percent each for vans and five-door hatchbacks.

Seventy-eight percent of the new-car orders will be for middle-line models, 16 percent bottom-line units, and six percent for top-of-the-line cars.

Three fleets will order some specialty cars in 1986. One fleet is planning to acquire one imported car, while four fleets now have a total of 10 imports in service.

Two fleets in the Financial Group are planning major changes in their engine specifications. One will order turbo-charged engines for its mid-size cars, the other plans to use four-cylinder engines in its mid-size vehicles. One fleet will order all 1986 models with standard transmission.

At the present time, this group follows the usual practice of equipping compacts with four-cylinder engines; mid-size cars with sixes, and large cars with eights.

Ten of the 13 fleets in the group give the company-car operator a choice in vehicle selection. Every fleet giving this choice permits the operator to select the make of car desired; six allow a choice of model. Three fleets permit choice of engine and two allow a choice of transmis-

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"AM/FM will be standard..."

sion. Only three of the 13 fleets permit the operator to add optional equipment items to the standard vehicle specifications.

Options as Standard Equipment

For many years fleet cars in all size categories have been well equipped — almost all fleets order all cars with air conditioning, automatic transmission, power disc brakes, and power steering. In this year's survey, three additional items of optional equipment are being ordered more than ever before.

Of 105 fleets ordering some large cars, 93 are equipping all units with AM/FM stereo radios; 81 are ordering all cars with cruise control, and 69 are equipping them with tilt steering wheel.

In the survey, 166 fleets are planning to order midsize cars. Of the 166, 131 are specifying AM/FM stereo, 114 are ordering cruise control on all units, and 66 are equipping cars with tilt steering wheel.

Seventy-nine fleets plan to order compact cars during the 1986 model year. AM/FM stereo will be standard equipment for 60 of these fleets' compact cars. Forty fleets are equipping all units with cruise control, while 20 are specifying tilt steering wheel.

Among the 15 fleets acquiring subcompacts, 11 are ordering them with AM/FM stereo, five with cruise control, and three with tilt steering wheel. AF

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Used Cars

The following are average car prices for the period ending September 4, 1985. Prices are based on wholesale activity at major dealer auctions across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically on IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.

Model	AVERAGE AUCTION PRICE Zone 1	Zone 2	Zone 3
83 AMC ALLIANCE			
Sdn 4DR L Series	3710	3748	3675
83 AMC CONCORD			
Sdn	3846	3881	3808
83 BUICK SKYLARK			
Sdn Custom	4421	4466	4379
82 BUICK SKYLARK			
Sdn	3622	3658	3586
83 BUICK REGAL			
Sdn	5778	5838	5721
Cpe	5940	5996	5882
82 BUICK REGAL			
Turbo Cpe	5305	5356	5250
Cpe	5392	5448	5337
83 BUICK CENTURY			
Sdn Custom	5731	5787	5671
82 BUICK CENTURY			
Sdn Custom	4853	4899	4804
83 CADILLAC			
Cpe DeVille	9885	9985	9788
Sdn DeVille	9828	9927	9728
82 CADILLAC			
Cpe DeVille	8164	8240	8077
Sdn DeVille	8110	8192	8031
83 CHEVY			
Chvt Htchbk 4 Dr	3397	3435	3367
Camaro Cpe 8	6407	6469	6343
82 CHEVY			
Chvt Htchbk 4 Dr	2693	2721	2670
Camaro Cpe 8	5536	5589	5479
83 CHEVY CELEBRITY			
Sdn	5300	5351	5243
82 CHEVY CELEBRITY			
Sdn	4485	4527	4440
83 CHEVY CAVALIER			
Sdn	4493	4539	4447
82 CHEVY CAVALIER			
Sdn	3539	3576	3506
83 CHEVY CITATION			
Cpe 6	3556	3592	3518
82 CHEVY CITATION			
Cpe 6	2754	2782	2723
83 CHEVY MALIBU			
Clas Sdn	5201	5254	5150
Clas Sta Wgn	5414	5468	5359
82 CHEVY MALIBU			
Clas Sdn	4336	4379	4293
Clas Sta Wag	4526	4569	4479
83 CHEVY MONTE CARLO			
Cpe	6002	6061	5942
82 CHEVY MONTE CARLO			
Cpe	5036	5087	4984
83 CHEVY IMPALA			
Sdn	5568	5625	5514
82 CHEVY IMPALA			
Sdn	4467	4513	4426
Wgn 9	4667	4513	4426
83 CHEVY CAPRICE			
Sdn	6326	6296	6172
Sta Wag	6451	6513	6384
83 CHRYSLER			
E Class Sdn	5351	5405	4299
82 CHRYSLER			
New Yorker Sdn	6544	6610	6479
83 DODGE OMNI			
4 Dr Cust	3414	3448	3381
82 DODGE OMNI			
4 Dr Cust	2596	2622	2569
83 DODGE ARIES			
Cpe	3990	4032	3952
82 DODGE ARIES			
Sdn	3057	4087	3025
83 DODGE DIPLOMAT			
Slm Sdn	4559	4603	4513
82 DODGE DIPLOMAT			
Slm Sdn	3679	3717	3643
83 FORD FAIRMONT			
Futura 6 Cyl Sdn 4 Dr	3884	3921	3844
82 FORD FAIRMONT			
Futura Sdn 4 Dr	3093	3125	3065
83 FORD MUSTANG			
L Cpe 4	4278	4320	4235
82 FORD MUSTANG			
L Cpe 4	3468	3505	3435
83 FORD LTD			
Sdn	4615	4662	4569
82 FORD LTD			
Sdn	4626	4674	4579
83 FORD ESCORT			
Htchbk 4 Dr	3941	3983	3899
83 FORD CROWN VIC			
Sdn	7005	7077	6933
82 FORD CROWN VIC			
Sdn	5476	5534	5423
83 FORD THUNDERBIRD			
Cpe	6338	6403	6275
82 FORD THUNDERBIRD			
Cpe	4976	5025	4927
83 LINCOLN CONTINENTAL			
Sdn	9755	9853	9660
Mark VI Cpe	12143	12262	12021
82 LINCOLN CONTINENTAL			
Sdn	8253	8336	8172
Mark VI Cpe	10084	10186	9987
83 MERCURY COUGAR			
Cpe	6446	6508	6383
82 MERCURY COUGAR			
GS Cpe	3698	3734	3660
83 MERCURY LYNX			
HtchBk 2-Dr	3291	3325	3260
83 MERCURY MARQUIS			
Sdn	4671	4720	4627
82 MERCURY MARQUIS			
Sdn	4878	4927	4828
Wgn 2S	5031	5079	4978
83 OLDS CIERA LS			
Cpe	5648	5705	5592
Sdn	5723	5780	5664
83 OLDS CUTLASS SUPREME			
Cpe	6286	6350	6223
Sdn	6111	6175	6053
82 OLDS CUTLASS SUPREME			
Sdn	5162	5232	5131
Cpe	5364	5439	5329
83 OLDS DELTA 88			
Sdn	6281	6344	6223
82 OLDS DELTA 88			
Sdn	4622	4669	4576
83 OLDS DELTA 98			
Sdn	8666	8751	8576
82 OLDS DELTA 98			
Sdn	7126	7202	7055
83 OLDS OMEGA			
Sdn	4421	4466	4379
82 OLDS OMEGA			
Sdn	3622	3658	3586
83 OLDS FIRENZA			
Sdn	4721	4768	4672
82 OLDS FIRENZA			
Sdn	3896	3936	3856
83 PLYMOUTH HORIZON			
4 Dr Htchbk	3422	3457	3386
83 PLYMOUTH RELIANT			
Cpe	4002	4041	3961
82 PLYMOUTH RELIANT			
Cpe	3201	3234	3170
83 PONTIAC FIREBIRD			
Cpe 8	6473	6538	6410
83 PONTIAC 6000			
Cpe	6620	6686	6551
Sdn	5572	5624	5513
82 PONTIAC 6000			
Cpe	4688	4736	4644
83 PONTIAC GRAND PRIX			
Cpe	6194	6255	6130
83 VOLKSWAGEN JETTA			
4 Dr Sdn	5196	5274	5143
82 VOLKSWAGEN JETTA			
4 Dr Sdn	4408	4452	4363
83 VOLKSWAGEN L SERIES			
2 Dr Htchbk	3996	4035	3956
82 VOLKSWAGEN RABBIT			
2-Dr Htchbk	3061	3091	3030
83 DATSUN			
Sentra 2 Dr Std Sdn	3523	3558	3448
Stanza Hbk 4 Dr Dlx	4801	4849	4753
82 DATSUN			
210 Std 2 Dr	2582	2608	2556
Sentra 2 Dr Std Sdn	2924	2954	2895
Stanza Hbk 4 Dr Dlx	3977	4017	3938
83 TOYOTA			
Corolla Sedan 2 Dr	4351	4394	4307
Celica St	6259	6321	6196
Camry Sedan	7072	7143	7001
82 TOYOTA			
Corolla 2 Dr Sdn	3554	3589	3519
Celica St Cpe	5083	5134	5032